

# RECREATION FEE DEMONSTRATION PROGRAM



## EVALUATION REPORT

### OREGON FEE DEMONSTRATION PROJECTS: Selected Oregon Sites



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# OREGON RECREATION FEE DEMONSTRATION PROGRAM EVALUATION REPORT

## EXECUTIVE SUMMARY



This report is the result of on-site evaluations of five of BLM's Oregon (OR) State Recreation Fee Demonstration Project Sites. The Fee Demonstration Act requires that an annual report on management, operation, and public sentiment about the program be submitted to Congress. This evaluation effort is intended to help BLM in its efforts to manage the sites in accordance with the tenets of the Act, as well as to collect and share best practices across fee demonstration sites throughout the BLM.

The report contains background on the Act and BLM's implementation of its projects, a review of the evaluation methodology and the evaluation guide itself, a statement of the OR State-specific factors affecting the evaluation, and national, state and district issues common across sites. The report also includes site-specific reports for each of the five sites evaluated.

The visitation and collections data for the evaluated sites are:

Site	FY 99 Visits	FY 00 Visits	FY 99 Collections	FY 00 Collections
Wildwood	100,000	95,560	\$29,815	\$35,808
Yaquina Head	284,994	295,251	\$247,581	\$264,364
Loon Lake	87,000	96,000	\$106,099	\$97,347
Tyee Recreation Area	6,200	4,360	\$7,890	\$10,039
Sharps Creek	1,391	1,275	\$2,782	\$2,482

Overall, staff at the OR Districts and sites visited have done a good job implementing the primary tenets of the Recreation Fee Demonstration Act. The sites have a number of exemplary practices that should be noted and shared elsewhere within OR and BLM. First, most of the sites use campground hosts to augment BLM staff and to keep a 24 hour presence at the site. This is a low-cost, high-return practice. Secondly, most of the sites have done an excellent job in ADA compliance, providing access to very unique recreation opportunities for disabled visitors. On a site-by-site basis the following practices were also noteworthy:

#### *Wilwood*

- Visitation increased by about 13,000 from 1998 to the present. This is due in part to the Cascade Stream Watch trail and the partnership with Wolfree, Inc. The Wolfree slogan, “Scientist for a day, steward for life,” exemplifies the very high-level of environmental education and interpretation that is available at the site. The partnership makes this possible, as BLM staff provide the primary operation and maintenance and Wolfree staff provide the environmental education programs.

#### *Yaquina Head*

- Yaquina Head staff have provided a very high level of quality (nearly perfect according to the Recreation Use Survey of visitors to the site) with an extremely high volume of visitors.
- There is a partnership with the Yehona Lights Friends group that leverages BLM staff and enhances the environmental education and interpretation opportunities for visitors to the site. Further, the Friends group has received \$29,000 in donations this year. These donations are very important to the operation of the site, as Yaquina Head does not receive pipeline funds.
- Yaquina Head staff demonstrate some of the best business acumen observed by the evaluation team. Their plans, training, and expense management are clearly best practices.
- Finally, visitors completing the Recreation Use Surveys across the BLM have consistently suggested the need for more environmental education and interpretation. Staff at Yaquina Head have all been trained and provide interpretation and environmental education at the tidal pools. They report that these experiences are some of their own career highlights. This training is documented and the model could be widely shared.

#### *Tyee*

- Tyee has a law enforcement (LE) agreement in effect with the county sheriff’s office. This extends District LE resources and provides for higher levels of LE that are needed at the site.
- Site management meet with the County Parks Director and the local Forest Service management on a monthly basis to provide a consistent visitor approach.

### *Loon Lake*

- Customer service orientation is extremely high at Loon Lake. A week of training is conducted for all seasonal employees emphasizing customer service, first aid and safety.
- Again, environmental education is exemplary at this site. A former District interpretive specialist developed a program which a seasonal employee has implemented using the amphitheatre at the site.
- Staff have also worked to establish the Loon Lake Celebration and make certain improvements to shift the visitor profile toward a family orientation. Capacity is managed to the limit by a very creative use of beepers for visitors.
- The site also has a law enforcement agreement with Douglas County to leverage sparse District LE resources.

### *Sharps Creek*

- Sharps Creek staff have also focused on development which has shifted visitation toward greater family orientation and more environmentally friendly visitors.
- Site staff have an arrangement with the local chamber of commerce to implement a site-specific survey, which has provided excellent feedback at a very low cost.

## **OR STATE SITUATION AFFECTING THE EVALUATION**

The following Oregon State-specific factors affect management and implementation of the Fee Demonstration Act in all of the fee sites visited in this evaluation. These factors, with one exception, have had a positive affect on implementation of the Fee Demonstration Act in the evaluated sites.

- Availability of “recreation pipeline” funding for western Oregon O&C recreation sites has helped to reduce deferred maintenance at these sites, although there still is work to do at most of the sites. The pipeline funding began in FY 1998 and created a significant workload (design, NEPA, contracting) for recreation and support staff. Given that pipeline funding would generally not carry over, most districts decided to emphasize pipeline projects, while the funding was still available. As a result, fee demonstration collections at the evaluated sites (excluding Yaquina Head) have been banked to be used as pipeline funding declines. Pipeline funding is expected to significantly decline in FY 2002. So, projects funded by fee demonstration collections should increase in the near future. The intent of the Fee Demonstration Act is to have collections used within a relatively short time frame to maintain and/or improve the sites. However, it makes sense to have spent the pipeline funding while it was available. Some sites have also indicated that they are saving some fee demonstration funds for larger projects, which cost more than the site brings in each year.
- The U.S. Forest Service is charging fees at undeveloped and unattended trailheads. BLM has not charged such fees. But, it should be noted that the practice of charging fees at unattended trailheads is still being debated among local politicians.

- All of the sites have been contracting within the local communities for a variety of services such as law enforcement, camp hosts, cleaning, and other maintenance and development. This is a positive use of Recreational Fee Demonstration Program collections that helps to leverage BLM staff and provides important socioeconomic benefits for the community.
- There has been no OR State Recreation Lead for one year. Rotating acting positions for 90-120 days have partially filled the need. However, a number of communications to the Recreation Program staff have fallen through the cracks due to the lack of continuity this vacancy and the rotation has created. As an example, several sites were unaware that the results of the Recreation Use Survey that they participated in were available on the web and/or had been sent to the State Recreation Lead.

### **NATIONAL, STATE, & DISTRICT COMMON ISSUES**

The following issues were identified as common across the OR sites evaluated. The issues were listed by the team at the close-out session and then edited, categorized as to the organization level to which the issues should be raised, and agreed to by all.

#### *National.*

- Communication about the program is often not getting to key recreation staff. Develop a fee demo website to contain all of the pertinent information for the program.
- New staff are unaware of the IMs and IBs that were used to establish and develop the sites. These communications include requirements for operation that these staff don't know.
- Staff are largely unaware of Recreation Use Survey results on MIS and annual report on line.
- Use of FIMMS is inconsistent.
- Customer Comment Card results have not been available for over a year.
- Every site had trouble using or understanding the MIS. Only one site has adequately reconciled its records with MIS.
- Coding elements in various financial systems do not support business tracking and reporting in projects with multiple dispersed sites. E.g. one RMA ID for multiple sites that collect fees make tracking collections and expenditures at a site level nearly impossible.
- There is little support at the District or site level for 20% hold back of fee demo collections without more information and criteria for how such funds would be used. Once pipeline funds end, the 20% hold back would clearly affect operations.

*State.*

- Not having a full time Recreation Lead at the State level has exacerbated problems in communication and consistency in program implementation. It is good that the announcement is out. Selection should be made as soon as a quality candidate can be chosen.
- The Act requires a public accounting and distribution of information about use of fee demo collections. The State Office public affairs staff could assist the Recreation Program by cooperating with Recreation staff in developing a comprehensive state-wide brochure about expenditures, the “Annual Public Accounting”. Forest Service has a nice example of such a publication for its OR fee sites.
- There is continued and growing demand for recreational use in the evaluated sites. However, continued development in the face of uncertainty of continued pipeline dollars may be problematic given the unfunded maintenance demand that such development creates.
- Every site wishes for “just one more” person or conversion of a term employee to full time or conversion of a seasonal employee to a term position. While additional visitor-related positions are currently needed in OR, continued site development forces a need for new staff that federal budget trends are unlikely to support. Such development should only happen when a current business plan is in place, which has factored in the broader workforce planning conditions, and funding has been well considered.

*District.*

- Once such a plan is in place, District management should look for redeployment of existing staff or use of positions coming available through retirement and attrition in other programs to growing areas including recreation. This is consistent with the West Side actions emerging from the 2000 SMT meeting. The Salem District has taken this to the point of prioritizing the filling of positions across all programs in the District.
- The number of law enforcement and fee payment compliance issues are significant enough at some sites to warrant a meeting of Recreation and Law Enforcement staff to discuss the issues and possible improvements to the current situation. Law enforcement issues should be addressed in all updates to the site business plans.

**SITE-SPECIFIC REPORTS**

See the Table of Contents to find each of the five site-specific reports.



# **OREGON RECREATION FEE DEMONSTRATION PROGRAM EVALUATION REPORT**

## **BACKGROUND**

Congress authorized the Recreational Fee Demonstration Program in section 315 of the Omnibus Consolidated Rescissions Act of 1996 (P.L. 104-134) and amended the program under Public Law 104-208, Public Law 105-18, Public Law 105-83, Public Law 105-277, and Public Law 106-291. Four federal land management agencies — the National Park Service, U.S. Fish and Wildlife Service, and Bureau of Land Management in the Department of the Interior, and the Forest Service in the Department of Agriculture — were mandated to implement a Recreational Fee Demonstration Program. This project allowed these agencies to test new fees in 100 sites that represent the geographic and programmatic spectrum of sites that they manage. Under the program, the agencies retain all of the new fees, with at least 80% of the retained fees to be used at the sites where they were collected. Up to 20% of the fee revenues may be used at other sites under the administrative jurisdiction of the collecting agency.

The Recreational Fee Demonstration Program was authorized to begin October 1, 1995 and end on September 30, 1998, with a final report to be submitted to Congress annually. These reports identify the annual accomplishments for the preceding fiscal year and any recommended improvements to the program. Congress subsequently authorized operation of the Program through September 30, 2002, with fees to remain available through September 30, 2005. An evaluation report is to be provided to the Committee on Appropriations no later than September 1, 2001.



During FY 2000, the Administration submitted to Congress a legislative proposal that would permanently authorize the Recreational Fee Demonstration Program. Provisions in the proposal were based on the experience of the agencies, and were consistent with recommendations for legislative and management improvements that were contained in previous annual reports to

Congress concerning the Recreational Fee Demonstration Program. To date, no action has been taken by the Congress on the Administration's proposal.

As of this date, 97 Bureau of Land Management projects collect fees. Fee demonstration revenues have increased in the Bureau of Land Management every year. Visitation to recreation sites participating in the Recreational Fee Demonstration Program continues to appear unaffected in any significant way by the new fees. Visitation at Recreational Fee Demonstration Program sites has remained relatively constant, hitting 19.3 million in FY2000.

## **PURPOSE OF THE EVALUATION/GOALS AND OBJECTIVES**

To ensure that the intent of the Fee Demonstration Program Act of 1996 is being administered properly, the BLM is now conducting an evaluation of its implementation within selected sites. The fee demonstration sites across the BLM run the gamut from highly improved visitors centers to rafting sites to camping sites to wilderness sites. These sites have significant Congressional interest and the fee collections now amount to over \$7 million. As such, the program has significant fiduciary responsibility for management and control of public funds. The integrity and management of the processes managing these funds should be regularly audited. Further, the program manages some of the premier sites managed by BLM from a visitor services perspective. It is in the Bureau's best interests to evaluate the management of these resources and of the interaction with the public we serve. Such evaluation should lead to discovering and promulgating best practices for other recreation sites and new fee demonstration sites, should Congress extend the program, and for development of and communication of improvement recommendations within each project or set of sites evaluated.

While cost of collection actually decreased in FY 2000, it is important to keep such costs down and to increase the percent of cost of operations of these sites that fees pay for. The BLM is getting more efficient with its collections. Costs of collection decreased from 39.1% in FY 1999, the previous year, to 25.5% in FY 2000 for a total of \$1.9 million. The evaluation process is intended to use the evaluation process as a means to collect and apply "lessons learned" from our experience with collecting fees.

Further, the evaluation process will help to monitor and improve the appropriate use of revenues collected on priority maintenance and enhancement projects. The Bureau asked each demonstration area to provide the top five deferred maintenance or enhancement projects for FY 1999-2000. The top five projects from each of the 97 recreation fee demonstration projects that charged fees in FY 2000 totaled approximately \$21.2 million. During FY 2000, approximately \$3 million from recreation collections was spent on recreation projects to reduce the number of deferred maintenance projects. The Bureau will spend approximately \$25 million from all sources on deferred maintenance, annual maintenance, and enhancement projects for these same sites during FY 2001. Site managers spent nearly 85.7 percent of the revenue collected during the fourth year of the Recreational Fee Demonstration Program.

## **METHODOLOGY**

*Site selection process.*

The intent of the Recreation Fee Demonstration Evaluation Cycle is to evaluate a representative sample of Fee Demonstration Sites in line with the following criteria. The intent is to get to most of the sites within a 4 year cycle, with high revenue, high visit sites being evaluated more frequently, and low revenue, low visit sites being evaluated less frequently.

The following factors are key in determining which sites will be visited when:

1. Representative cut across States/Areas/Sites
2. Representative cut of recreation activities
3. Level of Fiscal Risk--Revenue generated (highest to lowest)
4. Level of Fiscal Risk--Remote geographic locations (most remote to most central)
5. Reasonable travel clustering for evaluation team
6. Indication of Management or Fiscal Issues, such as:
  - IG/GAO report findings
  - Customer research findings (comment cards, recreation use survey)
  - Substantial changes in revenue collection, obligations, costs
  - Unusual Cost/Revenue Ratios
  - Request of State or WO Rec. Program Lead

*Intended audience of the evaluation and the site-specific report.*

This report is intended for use by BLM management responsible for oversight, management and operation of recreation sites designated as Fee Demonstration Act Pilot Sites. These managers and staff include: Site Management, Area, District and Field Office Management, State Management, and National Recreation Program Management, as well as the Assistant Director for Resources. The results will also be used in the annual Report to Congress.

*Evaluation method & records review process.*

The evaluation is conducted by an interdisciplinary team consisting of the following people:

- State recreation representative (usually the State Recreation Lead)
- State Evaluation Program Lead
- WO recreation specialist (team leader)
- Financial/Accounting Expert (knowledgeable about MIS, CBS, and RMIS)
- Evaluation Expert (under contract)

The team members were: Anthony Bobo, Team Leader (WO 250), Steve Gobat, OR Acting Recreation State Lead, Chris Turner, National Business Center, Glencora Lannen, OR State Evaluation Lead, and Kevin Coray, Human Management Services, Inc. Kamilah Rasheed, National Evaluation Lead (WO 830) and Lee Larson, (WO 250) acted as consultants to the team prior to going on-site.

The team generally followed the attached evaluation guide (see appendix). The guide calls for the team leader to request site-specific management and financial documents from each site. Key documents requested include reports from the Collections and Billings System (CBS), the Management Information System (MIS), and cuff records, as well as the various business, marketing and communications plans, the Recreation Use Survey results, fee schedule, activities plan, and web site for the site.

The Team Leader and contractor conducted a preliminary review of the documents. Shortly before the on-site portion of the evaluation commenced, the evaluation team met and the Team Leader assigned sections of the evaluation guide for which specific team members were responsible. Information from the preliminary review was provided to team members. Additional questions were added to the on-site question set based on the preliminary review. The team then followed the evaluation agenda/schedule established by the team leader and the State Recreation Lead.

For Oregon, the following sites were visited on the dates specified and attended by the listed staff.

<b>Site</b>	<b>2001 Date</b>	<b>Staff Present</b>
State Office	3/19	Elaine Zielinski, Chuck Wassinger, Debbie Pietrzak, Ed Shepard, Darwin Priebe, Kay Gargano
Salem District: Wildwood	3/19	Laura Graves, Dick Prather, Lee Shepard
Salem District: Yaquina Head Outstanding Natural Area	3/20	Steve Gobat, Jack Jameson, Paula Cline-Jones, Brad Keller, Kathy Angstrom. Also interviewed: Jane Maines, Executive Director Yaquina Lights (Friends Group)
Coos Bay District: Loon Lake	3/21-22	Bob Golden, Elaine Raper, George Caswell, Pat Dolan, Sharon Morris, Don Porior, Dave Cooper, Bob Barns, Ted Gage, John Harper (Sixes/Edson), Nancy Zepf, Ralph Thomas, Bev Hansen, Dennis Graham
Roseburg District: Tyee Recreation Site	3/22-23	Jay Carlson, Chuck White, Jan Gardner, Dave Erickson, Greg Morgan (provided email responses to assessment guide but was not available for on-site portion)
Eugene District: Sharps Creek	3/23	Joseph Williams, Bryant Smith, Clyde Pope

The agenda/schedule typically includes:

- Team briefs State Office management about the review and adds any content they recommend.
- Team travels to the first of the selected sites. The team meets with site, area, and program-related management at the site. They tour the site together and most of the questions from the interview guide are asked and answered.
- Back at the Field Office, the team asks any remaining questions and then meets separately to discuss the strengths and opportunities for improvement.
- Team begins the report preparation for that site, travels to the next location and repeats the interview process.
- On the last day of the on-site review, the team conducts a ½ day close-out briefing and discussion with State-Office representatives and representatives from relevant staff from every site. This is a participative session, rather than a one-way negative findings briefing, in which the SO, FO, and site management staff meet together with the evaluation team to develop the recommendations and implementation plan. By the end of the closeout, the outline of an implementation plan was complete and available immediately. The purposes of the closeout are apparent in the four-step closeout process:

1. Share best practices and best experiences from the site visit
2. Share constructive ideas for improvement
3. Design strategies for making practical improvements, using the combined resources from the State, the FO, the Project staff, the evaluation team, and WO staff.
4. Develop a plan for implementing the strategies

### *Utility of the evaluation to participants.*

The question “What did you find useful about the evaluation?” was asked of the attendees at the Fee Demo Program Evaluation Closeout for the five sites evaluated in Oregon State from March 19-23, 2001. The participants included: two state office representatives and from the site or areas visited, Resource Specialists, Area Office Managers, Recreation Planners, Park Rangers, and Recreation Technicians. Their responses included:

- It kept me on my toes and helped us focus on getting our paperwork done.
- Bringing the staff together at the site as well as here in a larger group at the closeout was useful for us to share ideas and best practices.
- It forced us to reflect on our program from a larger perspective.
- The site-specific report brought things onto our radar screen that were helpful.
- The link back to the “powers that be by” the evaluation team should be helpful in making the case on our local needs.
- The specific ideas for how to improve the fee payment booth and to make it more safe were helpful.
- It was helpful in identifying less useful procedures at the National level.
- The threat of the evaluation was useful to get people to reflect on the larger picture beyond operations and maintenance.
- Having State and Area and District line managers involved helped to refine their perceptions and awareness of the recreation program.
- We got lots of good ideas for security.
- It was nice to have a fresh look from non-involved folks.

### **OR STATE SITUATION AFFECTING THE EVALUATION**

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- The number of law enforcement and fee payment compliance issues are significant enough at some sites to warrant a meeting of Recreation and Law Enforcement staff to discuss the issues and possible improvements to the current situation. Law enforcement issues should be addressed in all updates to the site business plans.



WILDWOOD EVALUATION REPORT:

**SITE STAFF INTERVIEWED BY THE EVALUATION TEAM:**

Laura Graves, Dick Prather, Lee Shepard

**BACKGROUND**

Wildwood has extensive recreation facilities including two large group day-use shelters, over 60 family picnic sites, a playground, an athletic field and miles of both accessible and single track hiking trails. Located along the Salmon National Wild and Scenic River, environmental education activities related to watersheds and wetlands is an important part of the visitor's experience at Wildwood. The site features two accessible trails including the Wildwood wetland trail and the nationally Recognized Cascades Stream Watch trail. Fishing has historically been a very popular activity at Wildwood, however, regulations related to protecting federally threatened fish species has reduced the amount of fishing.

Visitation for Wildwood was estimated at 87,000 people in FY 1998 and over 100,000 people for FY 1999. The increase is most likely attributed to the opening of the cascade stream Watch trail in the fall of 1998. Visitation in FY 2000 declined slightly to approximately 95,560 people. This is due in part to a natural decline following the opening of a new attraction. A new state reservation program being used to reserve Wildwood's group facilities may have also caused

some confusion for those unfamiliar with how to use the service. Visitation is expected to increase in the long term as the site becomes well known and as a result of using a volunteer host program to assist in extending the park's open season.

Since FY 1999, Wildwood has charged a \$3.00 daily vehicle permit fee, which is collected at several self-service pay stations in parking areas throughout the park. Site staff use vehicle reminder handouts to assist in compliance with fees. In FY 2000, the estimated fee compliance rate for the daily vehicle fee was 70%. The compliance rate at the site is expected to increase in FY 2001 with the opening of an entrance booth where fees will be collected. The self-service pay stations will continue to be used when the booth is closed.



### **KUDOS/BEST PRACTICES**

The two best aspects of Wildwood are its very extensive accessibility and the environmental education and interpretation on site. The educational component of the site is provided by two self-guided trails, which feature interpretive signs, models, and a very popular in-stream viewing structure for observing fish in their natural habitat. The site is also used by Wolfree, Inc., a nonprofit organization that provides extensive youth education to Portland schools and other under-served schools. Wolfree has helped develop a unique partnership with the BLM, Forest Service, and several other public and private sponsors. It's Director, Dale Waddell, is an ex-Forest Service employee who has made this science and environmental education service a major community-based success. Their motto is: "Scientist for a day, steward for life". According to site management, this partnership allows them to "do things we could never do by ourselves." As a best practice, the curriculum is general enough to be used at other similar sites.

Another best practice is the use of hosts or volunteers who live at the site, using RV hookups. These hosts provide additional on-site labor and help with miscellaneous visitor services.

Further, a nearby forest service visitor center does sell Wildwood daily and annual vehicle passes. While this does provided added customer service, there has been confusion and frustration on the part of visitors who confuse Wildwood's passes with the forest service passes (see opportunities section).

High point experiences for the staff include having very diverse visitors and their recreational uses of the site, as well as the discovery that visitors experience are exciting to the staff. Further, the development of the site has changed it from being "invisible" to a site of which the public and the State Office are much more aware. The Cascade Stream Watch trail and the environmental educational activities that accompany the facility have brought lots of VIP tours (including a visit from former Secretary Babbitt), media coverage, and features in magazines (see Recent sunset magazine article).

## **WISHES**

Staff wishes for the site include:

- More recreation-related directives for the 6330 account in which the recreation program (6332) competes with extensive directives related to soil/water (6333) and wildlife/botany (6334).
- Development of a safe exit and entrance turning lane from highway 26. While this improvement is not within the jurisdiction of BLM, park staff, visitors, community members are very concerned with the current turn-in. More than one traffic accident has occurred at this entrance.
- Development of a trail on a recently acquired parcel of land and an easement, that is adjacent to Wildwood and continues along the Salmon River.
- Development of a full-color brochure that will replace three separate, less attractive, single-color brochures.

## **PROGRAM MANAGEMENT AND CUSTOMER SERVICE**

Deferred maintenance funding has been fairly limited for the last decade, however, a Western Oregon account referred to in 5830 "Recreation pipeline" has allowed for several infrastructure repairs and improvements. These improvements have reduced the number of "deferred maintenance" projects for the site. Two deferred maintenance projects still being requested are: upgrading the park's septic system and treating the Salmon River wood footbridge. The Salmon River footbridge spans a designated wild and scenic river that has federally listed anadromous fish. As such, treating the wood footbridge will be an expensive project. Most of the other "deferred maintenance" projects are smaller and fall below the \$25,000 required minimum. In addition, other than labor dollars for the site manager, Wildwood receives only \$7,000 in facilities maintenance funding (6251 and 6252). Such limited facilities maintenance funding makes park and Recreation staff question how Facilities Inventory Maintenance Management System (FIMMS) is used in the funding process. Potential Recreational Fee Demonstration Program projects include improvements to the existing restrooms, maintenance to the Cascade Stream Watch Trail and developing a full-color brochure.

Other Program Management and Customer Service observations include:

- A public accounting of collections and expenditures has been conducted as part of an annual program summary sent out to those on the SALEM DISTRICT mailing list.
- Since there is so little deferred maintenance, and many projects are below the \$25,000 limit, FIMMS doesn't work well as a monitoring system for the site.
- Relative to customer feedback, the site has performed well on the Recreation Use Visitor Survey conducted last in 1999.
- A public accounting of collections and expenditures has been conducted. However, these have not been shared or marketed to the visiting public nor to interested and involved community members.
- The fee schedule has not been re-evaluated since the original business plan.

**Opportunities for Improvement:**

1. However, the site has only received comment cards from 1999. While these cards are used to help prioritize work, they are no longer being received. Where they are getting stopped in the pipeline is unclear. It is possible that due to a series of acting State Recreation Leads, the cards have been misplaced.
2. Use simple mechanisms to share expenditures with the public to market the effective and responsible use of funds collected from the public. Project improvements could be listed or displayed in key interpretive areas where they would be likely to be seen by visitors.

**FISCAL RESPONSIBILITY AND REPORTING**

- Two people pick up money from the fee tubes twice a week.
- Two people always open the envelopes and count the money.
- They have a slotted safe that allows employees access to placing funds in the safe without actually having the combination.
- The safe is located out of the public view in a locked room.
- Employees who collect the fees are designated as collection officers.
- The funds are converted to money orders and then mailed certified to the District.
- The facility has built a fee station and will begin collecting fees there. They will be offering credit card as an option for payment.

**Opportunities for Improvement**

3. The site is using double fee tubes. However, the replaceable fee boxes are not locked. They should be locked.
4. The combination to the safe needs to be changed. It should be changed once a year or whenever someone leaves who has the combination.

## **PLANNING: COMMUNICATIONS, MARKETING & BUSINESS PLAN**

As in other Oregon Districts that had existing non-Recreation fee sites that were brought into the Recreation Fee Program there is no District wide Communication or Business Plan. No Communication Plan was available for the site. Although, aspects of such a plan are included in the Business Plan developed in 1999. Very little in the way of reporting the state of the Recreation Fee Demonstration Program to the local public has been done since the initial start up phase was completed. The site manager does live in the local community and has frequent informal contacts with local citizens.

Little in the way of fee revenues has actually been spent on sight. Rather, the improvements have been funded with “Pipeline” funds. These funds are beginning to run out and the site will soon shift over to using banked fee funds to provide ongoing maintenance activities. Fee funds are brought into the AWP planning process and appear to be being spent properly.

### **Opportunities for Improvement:**

5. While no District-wide Communication or Business Plans have been required in the past, it is recommended that such plans be developed to identify expected revenues, expenditures and methods for communicating the Recreation Fee Program successes to the public, internal audiences and elected representatives. The Wildwood Business Plan has not been updated since it's inception; but with the recent addition of the fee booth and the need to update the public brochure, it appears to be an opportune time to take a fresh look at the site Business Plan.
6. While a Public Brochure explaining fee expenditures may not be appropriate for a single site such as Wildwood, the Salem District could consider producing a District wide brochure that covers all of the Recreation Fee sites in OR10, or work with the OR State Office in developing a state-wide annual public accounting piece. This piece would highlight fee dollars that have been spent in the District and on site to give public a sense of where the fee dollars are being spent.
7. Public outreach is needed on the State reservation and the U.S. FOREST SERVICE passes sold in the area to lessen confusion.

## **PUBLIC WELFARE, EMPLOYEE SAFETY AND LAW ENFORCEMENT:**

Wildwood has virtually no significant Law Enforcement or Public/Employee Safety issues. Fees are collected on Mondays and Fridays. Two individuals collect the fees from double boxes transfer the funds to a safe at site headquarters. Deposits are made through a multi-step process that involves getting large bills from a local bank then purchasing a money order from the U.S. Post Office. Fee compliance is estimated to be approximately 70%. This is expected to increase once the new entrance booth is opened this summer. All recent dollars spent on deferred maintenance have directly effected public health and safety, projects included new accessible restrooms, and new improved roads.

**Opportunities for Improvement:**

8. The site should consider developing written fee collection and safety procedures to insure that all employees know and understand how to recognize and appropriately deal with potentially dangerous situations.
9. There appears to be a very predictable procedure for collecting the fees from the remote boxes. It would seem appropriate to vary the days and times the boxes are emptied so no pattern can be discerned.
10. Increase signage for use (biking trail, dogs on leash, etc.). Pamphlets may not be enough to inform public of restrictions.

**STATE/AREA MANAGEMENT**

Site staff feel that they are getting great support from management on the Recreational Fee Demonstration Program. They have concerns about the continuity of the recreation program because there has not been a OR State Recreation Lead for the last year. Staff are encouraged that the job announcement is now on the street.

Though the Salmon National Wild and Scenic River is part of the NLCS managed lands, general concerns were raised about whether the NLCS program may adversely affect appropriated dollars available for areas outside NLCS. The worry is that base dollars in the Salem District will go to the River at the expense of the sites such as Wildwood.





## **YAQUINA HEAD EVALUATION REPORT**

### **SITE STAFF INTERVIEWED BY THE EVALUATION TEAM:**

Steve Gobat, Jack Jameson, Paula Cline-Jones, Brad Keller, Kathy Angstrom

Also interviewed: Jane Maines, Executive Director Yaquina Lights (Friends Group)

### **BACKGROUND**

The area has great brochures and maps. Recreational Fee Demonstration Program information is woven throughout the material and all public contacts about the site. Site visitation is centered around the light house, visitor center, and the tide pools. The facilities have been engineered with accessibility in mind. The area is open year round and has 100% compliance rate when the fee booth is open. Approximately 25% of the visitors turn around when they see they have to pay at the booth. Visitation went down when the killer whale, Keiko, was removed. But, visitation has been on the rise recently, since the opening of the new aquarium "walk through" shark exhibit.

Harbor seals and whales are visible offshore year-round. In spring and summer, thousands of seabirds flock to the near-shore islands to breed and raise their young. At low tide, you can observe pools filled with inter-tidal life. Oregon's tallest and second-oldest lighthouse has illuminated this promontory since 1873. Archaeologists have also discovered evidence of Native

American visits to the site. Yaquina Head is managed to protect its scenic, scientific, educational and recreational value.

### **KUDOS/BEST PRACTICES**

This site is a well run, well organized operation. The staff have the tools and training to operate the site as an effective business. It's records and procedures are exemplary, having reconciled books that are fully in line with BLM records.

The site has extensive partnerships for community involvement, leveraging of its labor force, and furthering the environmental education mission of the site. Its friends group, Yaquina Lights, Inc., a not for profit organization, has helped to augment the Yaquina Head resources. Donations have increased over four fold in four years, now reaching \$29,000 per year. These funds are extremely important to Yaquina Head, as it is not included in the substantial pipeline funding available to some other recreation sites in OR.

A simple illustration of the Yaquina Head business-minded operation is the recycling of uniforms to aid the quick start-up of its seasonal workforce. Yaquina Head also keeps expenses down through very effective purchasing practices, use of its cooperative college intern program, hosts, and tight staffing.

Further, the Yaquina Head commitment to environmental education and interpretation are also exemplary. Michael Noack, the Yaquina Head Chief Park Ranger, has developed the educational and interpretation training. His customer service attitude is infectious. His personal example and the training provided helps his staff deliver a high level of customer service to Yaquina Head visitors. Trained seasonal staff conduct regularly scheduled interpretation and education events that are a key aspect of the continued attraction of the site to its publics. A new whale watching film has been just completed and should increase revenue and expand the Yaquina Head educational opportunities. Annual mailings about the tidal pool are sent out to stimulate increased use of the site. The reservation system works well to manage capacity at the tidal pools.



Other Yaquina Head kudos include:

- Staff are working on a grant to develop a 2-year degree program to prepare students for careers in Marine Education, in cooperation with Hatfield.
- It has a contract for restroom cleaning. Staff inspect restrooms daily. Visitors compliment Yaquina Head on the cleanliness and upkeep of the restrooms.
- Regular community communication is maintained and it's regularly featured in national and regional publications.
- It has also worked hard to provide extensive accessibility to all of its areas of interest. Several staff mention interaction at the tidal pools with disabled public as high-point experiences in their work. The level of accessibility, coupled with the effective design, has resulted in several awards for Yaquina Head, including the BLM National Recreation Award.
- It has also conducted an economic analysis of the impact of its operation on the tourism benefit it provides to the community.

### **WISHES**

Staff wishes for the site include:

- Enough people and money to fully staff the fee booth during open hours in the high season.
- Much better uniform purchasing process and vendor responsiveness management.
- No hold back of the 20% of the fee collections.
- Standard national pass to reduce fee confusion and visitor complaints.

### **FISCAL ACCOUNTABILITY & REPORTING**

- Record keeping regarding fees is excellent.
- Two people transport the fees from the fee booth to the office for counting and deposit preparation.
- There is a proper separation of duties between receipting, receiving and depositing.
- The safe combinations have been changed this month.
- The daily reconciliations are always completed and are very thorough.

### **Opportunities for Improvement**

1. Too many people have access to the cash box after hours at the office. Only the person responsible for the fund should have access to the fund.
2. The fee booth should offer credit card as a method of payment. We discussed how this could be done quickly in order to not hold up the line of cars at the booth.
3. Two people should be opening the fee envelopes. Currently, only one person does this.

### **PROGRAM MANAGEMENT**

- The Recreation Management Information System (MIS) site number matches FIMMS.

The Site Manager states he had been lead to believed that FIMMS only applies to “deferred maintenance” for projects above \$25K. Therefore, all required information is not being entered.

- Customer Feedback cards are not being given out, unbeknownst to Site Manager. Box of them are kept under employee’s desk. Reason given is that when they were given out, they rarely returned and it was felt that there was no benefit to them.
- The annual accounting of collections and expenditures was provided and is attached to this report. In addition to this information being published via the annual program summary, it is provided to the public via public presentations, brochures (last updated march 2001) various publications and other venues such as radio talk shows.
- The District Management supports this site, but the stopgap seems to be with the outdated "formula" used to allocate available funds developed by a committee consisting of the OR/WA State Office, District Operations and Maintenance Staffs.
- This site is not in the NLCS. Site Manager is concerned that because they are not included under this, that in the future, when Congress provides funding to NLCS, sites like Yaquina Head Outstanding Natural Area will not get needed funding.
- Relative to customer feedback, the site has performed well on the Recreation Use Visitor Survey conducted last in 1999. In fact, Yaquina Head Outstanding Natural Area has had the highest ratings of customer satisfaction to date of surveyed sites.
- A public accounting of collections and expenditures has been conducted. These have been very effectively shared and marketed to the visiting public and to interested and involved community members.
- The fee schedule has been re-evaluated since the original business plan. As a function of the reevaluation, fees for different uses in the site were collapsed into a single fee.

#### **Opportunities for Improvement:**

4. Enter all maintenance into FIMMS. Solicit training of SALEM DISTRICT staff who administer FIMMS.
5. The site has only received comment cards from 1999. While these cards are used to help prioritize work, they are no longer being received. Where they are getting stopped in the pipeline is unclear. It is possible that due to a series of acting State Recreation Leads, the cards have been misplaced. Alternatively, the cards may not be coming from the vendor. These cards are of limited utility, since they are so untimely. There are regular “inspections” made by regular daily visitors from the community, which coupled with staff interaction with the public are far more effective in responding to public concerns.
6. Another concern about the cards, however, is that they have not recently been passed out at the fee booth.
7. The area only allows an opportunity to pay at the booth. A within-site opportunity to pay may increase compliance.

### **PLANNING: COMMUNICATION, MARKETING AND BUSINESS PLAN**

The area has excellent planning documents. The first business plan was modified a few years ago after project expectations changed. Through the implementation of the communication plan, public expectations and support for the fee program was managed.

The area's plans have been used in National Fee workshops and are highlighted as great examples of business and communication plans.

A Forest Service brochure communicating the state-wide use of fee collections was given to the team to illustrate an effective and well-written mechanism for communicating to the public about how their fees are used.

### **PUBLIC WELFARE, EMPLOYEE SAFETY AND LAW ENFORCEMENT**

The area has considered safety in all of its activities. However, a written plan for people that staff the booth and a policy which requires that two people carry the money away from the booth are essential.



## **TYEE RECREATION AREA EVALUATION REPORT**

### **SITE STAFF INTERVIEWED BY THE EVALUATION TEAM:**

Jay Carlson, Chuck White, Jan Gardner, Dave Erickson, Greg Morgan (provided email responses to assessment guide but was not available for on-site portion)

### **BACKGROUND**

The site has area brochures. One of the guides has a short text block on the Recreational Fee Demonstration Program. Located on the main stem of the Umpqua River, the TYEE Recreation Site campground and picnic area and pavilion offer recreation opportunities to camp, picnic, fish, raft, and play in the Umpqua River. All but one campsite, all restrooms, faucets, pathways, and parking areas are accessible to the disabled. Access down to the river is not disabled accessible.

The site is open year round and has a campground host. The area is also used for weddings, company parties, and church groups. Primary times of use are between Memorial Day through Labor Day. The area has a 98% compliance rate and most visitors are local. An unusually wet and cold Spring in 2000 has caused lower visitation. Since the Recreational Fee Demonstration Program has started, there has been no change in visitation. There are no active partnerships in the area.

Relative to the consideration of a 20% hold back, site management said that they would find a way to get around the difference as they operate the site. However, they feel the cutback would be noticeable in site operation. Further, they feel they are getting hit with the 20% reduction because large sites within the project are funding small sites within the project.

Management has made a conscious decision not to charge fees at every site to allow publics that cannot afford the fees to recreate on public lands.

### **KUDOS/BEST PRACTICES**

- TYEE maintains a law enforcement occupied trailer on-site, with LE presence, as part of its agreement with the County Sheriff's Office.
- Extensive improvements made by Boy Scouts and prison inmate crews have helped to keep expenses down.
- They have developed their own comment card to help give immediate feedback to staff for better standardization, consistency, and motivation.
- They conduct a monthly meeting with County Parks Director and Forest Service to keep a consistent approach on a Regional basis.

### **WISHES**

Staff reported the following wishes for the site:

- Conversion of term employees to full time permanent.
- Some way to reduce the time it takes maintenance staff to prepare for data entry and enter data into Collections and Billings System (CBS).

### **PLANNING: COMMUNICATION, MARKETING AND BUSINESS PLAN**

Status: The District ORP has kept excellent records and produced a well developed internal information package. All of the information needed for an "Annual Public Accounting" exists in electronic format.

Recreation staff has made presentations to local disabled and senior organizations. The District ORP holds monthly meetings with the county Parks Supervisor and the U.S. Forest Service Recreation Supervisor.

As in other Oregon Districts that had existing fee sites that were brought into the Recreation. Fee Program, there is no Communication or Business Plan, as initially allowed by the Washington Office.

The site uses on-site District Customer Survey Cards, personal communication from visitors to the site host and the BLM Customer Comment Cards (District Office only) to solicit visitor concerns and suggestions response.

**Opportunities for Improvement:**

1. While no Communication or Business Plans have been required in the past it is recommend that such plans be developed in order to identify expected revenues, expenditures and methods for communicating the Recreation Fee Program successes to the public, internal audiences and elected representatives.
2. While the information regarding fees is available for public revenue through Recreation Management Information System (RMIS) data most public's do not know that RMIS exists. The District ORP has all of the information necessary to produce an Annual Public Accounting of the Recreational Fee Demonstration Program project. As with other districts the opportunity to work with the Oregon State to produce a state wide "Annual Public Accounting" exists.

**PROGRAM MANAGEMENT (RMIS SITE #00098.000)**

- Monitoring and reporting of maintenance backlog is through Recreation Pipeline Program and FIMMS. There is no backlog now.
- An annual accounting is accomplished yearly in RMIS which is used in Public Land Statistics (for annual collections) and in the Annual Program Summary. No one from public has requested information.

**Opportunities for Improvement:**

3. Like the various informational site brochures, develop a simplified year-end brochure showing expenditures and projects completed. Place it at the front desk. Also, send it to local Congressional representatives and special interest groups.
4. Site receives adequate support from District Manager; however, he has not been out to the Recreational Fee Demonstration Program site. He does ask for updates and reviews and will compliment staff on professionalism. The Field Manager is very involved and has been on the site numerous times. The District Recreation Lead is very proactive and involved. Guidance and policies are adequate and passed on in a timely manner by Recreation Lead.
5. Recreational Fee Demonstration Program guidance allows using fee collection monies for maintenance, such as maintenance contracts. It has not been used for this in the past. Utilize this money for these contracts.
6. Would like to see Recreational Fee Demonstration Program continued. However, some of their local customers are young parents with children who do not have much money. Therefore, would like to see each district keep at least one recreation site non-fee.
7. Would like District to review situation of long-term maintenance employee. He has been here for 10 years and is quickly approaching the end of his appointment. He has quite a bit of corporate knowledge, history and expertise that would be lost once he leaves. As with other districts, they raise the question of why is this individual being kept on as a term. If the position has been necessary for 10 years, this expertise is obviously necessary. Staff states it is unfair to individual to remain in this status.



## **FISCAL ACCOUNTABILITY AND REPORTING**

- The fee envelopes are collected by the camp host but not opened. Then a BLM employee verifies the envelope numbers and takes them, unopened, to the District Office. There, two people open and count the money.
- All employees handling money are designated.
- The site management is using the Recreational Fee Demonstration Program funds extensively to improve the visitor experience. This is in accordance with the Act which suggests that the funds should be regularly reinvested.

### **Opportunity for Improvement**

8. Recommended that the vault to be bolted to the wall or floor.

## **PUBLIC WELFARE, EMPLOYEE SAFETY AND LAW ENFORCEMENT**

The area is remote, making public welfare, employee safety and law enforcement somewhat more difficult. The following observations suggest that the site is doing an effective job in these areas:

- The area has used the Bureau's collection procedures to insure safety of funds. The employees are well trained and standards are written from IM 99-148.
- The host reminds a visitor about payment once. If payment is still not made, then the parks crew contacts the user about payment. Finally, the LEO is contacted if payment is not made. Written non-compliance is sent out.
- Hazard trees have been inventoried and treated annually. The Umpqua River was carving at the bank, threatening one of the campsites. Dave Erickson, engineers, parks crew and volunteer County Inmates tackled the problem and constructed a wall to stabilize the river bank. Geo-tech cells were used and vegetation was then replanted.

### **Opportunities for Improvement**

9. Engage in decision with local police to insure compliance and safety of visitors and employees.
10. More Recreational Fee Demo. Program signage and a list of improvements paid for by fees.



## **LOON LAKE RECREATION AREA EVALUATION REPORT**

### **SITE STAFF INTERVIEWED BY THE EVALUATION TEAM**

Bob Golden, Elaine Raper, George Caswell, Pat Dolan, Sharon Morris, Don Porior, Dave Cooper, Bob Barns, Ted Gage, John Harper (Sixes/Edson), Nancy Zepf, Ralph Thomas, Bev Hansen, Dennis Graham

### **BACKGROUND**

An average of 91,000 people visit Loon Lake Recreation Area each year. Day use has decreased slightly because more families are coming to the site to camp and visitors are using more jet skis and mobile homes as compared to previous years. Camping, picnicking, fishing, hiking, boating, and environmental education are opportunities at the area. Poor customer service at nearby private vendors has caused some increased camping use for the Loon Lake Recreation area. Six campsites are under the NW Reservation System that is working well. There is a full color brochure and map for the area with a fee schedule.

### **KUDOS/BEST PRACTICES**

A key feature of the management of the staff at Loon Lake is the extensive emphasis on customer service. Staff are encouraged to go out of their way to help visitors in any way. Further, seasonal staff gets one week of training at the beginning of the season which emphasizes customer service, rules for use, safety, first aid, etc. This curriculum could be shared broadly. Staff also attend a weekly staff meeting where Loon Lake concerns are managed and consistency of rules are addressed.

Further, the interpretive and environmental education programs offered at the amphitheater are great examples of site use that furthers the BLM educational mission. A long-term seasonal employee has been managing and conducting the majority of this program. This employee was aided by the former District interpretive specialist.

The annual Loon Lake celebration is a family-oriented celebration that emphasizes the environmental and community aspects of the site. In cooperation with the OR Dept. of Fish and Wildlife, big fish are stocked in the lake to facilitate youth fishing and capture of big fish and optimal recreation experiences.

One customer feedback card suggested beepers be handed out to customers waiting in line to get into the campground. With beepers, customers would not have to stand in line for hours, could go into the campground and have a picnic or swim, yet still be notified when their “number came up”. The staff took this advice and purchased (with Recreational Fee Demonstration Program money), beepers for their customers. The beepers, like those used by restaurants, are used to bring usage of six reserved campsites up to absolute capacity during peak periods. Since six campsites are reserved through a reservation system, Reservations NW, when a camper leaves one of the six sites it may be available for a few hours for day use or for other campers to move into early. The beeper process helps to allow the maximum number of users to access these facilities. Further, it provides some flexibility for management to use disability sites held until 5:00 p.m. to be used by others if disabled people don’t need those sites. Feedback has been extremely positive.

Another suggestion was to install soap containers in bathrooms – which staff also implemented. Generally, customers to this recreation area are generational – families have been returning to Loon Lake year after year. Staff states this, alone, makes Loon Lake different than other fee sites. Customers love Loon Lake and regardless of fee, they will come.

Other kudos:

- Major improvements at the site have improved its attractiveness--increased visitation is expected.
- There is a law enforcement agreement in place with Douglas County that extends the BLM capability to respond to very necessary law enforcement issues at this site.
- Picnic tables are accessible. All campsites and restrooms are being rebuilt to ADA standards.



- Due to a strong connection with the Boy Scouts of America, scouts have completed numerous projects at the Lake. On the projects, the scouts are recognized for their contribution.

## **WISHES**

Staff wishes for the site include:  
Two more helpers in the summer.

## **FISCAL ACCOUNTABILITY AND REPORTING**

- An employee, accompanied by the Sheriff's deputy takes money to the office.
- Cash funds are not shared. Each employee has his or her own fund and no one else uses it. All personnel handling funds are designated appropriately.
- Two people collect the fee envelopes and count the funds. The safe has a slot in the top, which allows the employees who have collected the envelopes to put them in the safe without getting into the safe.
- The funds are kept safe when transporting to the District Office. They are locked in a bag which has the key located at the District so no one in transit can get into the bag.

## **Opportunities for Improvement**

1. The cash funds are not kept in the safe during off-shift times. They are kept in the dorm rooms. A larger safe should be purchased with Recreational Fee Demonstration Program funds and individual locked cash boxes should be locked in the safe when not in use. The old safe could be kept to hold revenue from the booth before it is sent to the District Office. Locking money boxes have been purchased for each staff person and a safe is provided to lock their boxes each day.
2. The booth has a sliding glass door. We recommend that the door be replaced with a window that doesn't allow the public access to the booth. A restroom could be added so the employee doesn't need to leave the booth during his/her shift. **We will work on improving the booth operations making it safer for the staff at Loon Lake.** The booth needs to

have its security reevaluated in its entirety.

3. The Recreational Fee Demonstration Program funds are not being used because the staff is afraid to depend on them. They have used them for a couple of things but should be using them for more improvements. The site management was a little unclear as to what Recreational Fee Demonstration Program funds could be spent on.

### **Assistance Provided**

We advised the Recreation Planners at Loon Lake that we could set up more actions in CBS to allow them to collect revenue data more accurately and use it more effectively. They are going to provide information to the CBS staff so that these can be set up as soon as possible.

We advised the staff that they could use Recreational Fee Demonstration Program money for hiring seasonal employees and more law enforcement. We will also be asking the Washington Office to provide some additional guidance in this area.

### **PLANNING: COMMUNICATION, MARKETING & BUSINESS PLAN**

Status: The site was established under a development plan in 1971 as a for fee Recreation site. In 1998 the fee collection activities were placed under the Recreational Fee Demonstration Program. As in other Oregon Districts that had existing non-recreation fee sites that were brought into the Recreation Fee Program there is no District wide Communication or Business Plan. The District has recently (March 2001) completed a Business and Marketing Plan for Loon Lake.

The staff did little in the way of outreach activities during the switch over to the new program. This was primarily because the fee system was already in place and the public would not necessarily notice any change. There was some exchange of information with the O&C Counties to get buy off on how recreation fees could be expended. Since start -up there has been limited outreach to explain the program or provide the public with updates on how the funds have been spent.

The new Business Plan appears to be comprehensive from the business and marketing end but is lacking in a defined communication/outreach plan. There appears to be an inconsistency in the plan between problems caused by jet skis (e.g. noise, parking, safety) and the proposal to develop a slalom course that could increase the noise and parking problems.

Customer feedback is being accomplished through District Comment Sheets, Customer Comment Cards, BLM Survey's and personal contacts. The staff has a clear idea of the issues facing the visitors and has taken or plans to take appropriate action.

**Opportunities for Improvement:**

4. With the completion of the new developments at Loon Lake there is an opportunity to develop a Communications Plan/Strategy that would provide direction for outreach activities. This activities would not only help keep the public informed but would serve to promote BLM programs, increase public support and meet the directives of Congress.
5. Inconsistencies in the Business Plan regarding problems and opportunities concerning jet ski's provides the opportunity (if it has not already been accomplished) for a District-wide interdisciplinary review, including public participation, of jet ski use at the site, whether or not jet ski use is an appropriate use and opportunities for addressing conflicting issues.
6. Provide more internal and external information on Recreational Fee Demonstration Program spending and collections. The Oregon State Office could provide statewide support and leadership in developing public outreach documents, in particular the Congressionally directed "Annual Public Reporting" not only for Loon Lake but all other state recreation sites.
7. The existing Fee Collection Station is not adequate to handle current visitor use and BLM fee collection and safety standards. Replacement of the structure is not identified as a priority item in the Business Plan. Consideration to replacing the structure including the addition of a weather protected waiting area for visitors should be considered.
8. While there is a full color brochure and map for the area that includes a fee schedule, a new brochure could also explain the Recreational Fee Demonstration Program, as well as including the fee schedule and map.

**PROGRAM MANAGEMENT AND CUSTOMER SERVICE**

This site is identified in the RMIS as a fee pilot site. Its identified name is Loon Lake Recreation Area (LLRA). There are two sites incorporated under LLRA – Loon Lake and East Shore. Loon Lake site number is 73. East Shore site number is 581. There appear to be more identifiable elements used in FIMMS than there are in RMIS. As a result, accurate accounting is difficult.

FIMMS is used to monitor and report maintenance backlog. A copy of this backlog is attached. The Maintenance Engineer's staff is responsible for entering data into this system.

This is an Oregon west side district that has O&C funding. Primary subactivities used included 6332 (O&C Recreation), 5830 (Recreation Pipeline), 6251, 6252 and 6253 (O&C Maintenance Operations, Facilities Maintenance, and Deferred Maintenance), 3250 (Title VIII, Deferred Maintenance), 1232 (Recreational Fee Demonstration Program), and 9710 (Quarters Maintenance). Title VIII Deferred Maintenance Funding available this year (2001) will be used primarily for major reconstruction of the shop building, drain field, dorm renovations and construct a storage building. The O&C District Recreation leads meet each year to prioritize

projects and divide the Recreation pipeline funding among the Districts. The Site Manager states that most actual deferred maintenance projects will be completed by the end of this year due to the large amount of pipeline and deferred maintenance money received over the past 4 years.

The majority of customer feedback is “considerably positive” due to the customer service staff provide. There are three full-time staff (two maintenance and one site manager) and a significant number of seasonal employees during the summer. There is no site host. But, during the winter, a host couple do staff the booth and do light clean up during the wintertime.

Staff cites that publicity and advertising is their weakest area. Not much has been done to advertise yearly expenditures or projects completed to the public. The district produces an annual summary of expenditures and projects. They are in the midst of developing a management plan for the area that will include communication with the public. However, staff states that site remains full without advertising.

### **Opportunities for Improvement**

9. Coos Bay Homepage could include expenditures and completed projects for public to access. Develop listing of external interest groups (i.e., Congressional representatives, environmental groups, potential local partnering opportunities, newspapers, etc., and automatically send listing of fees collected and projects completed).
10. Staff would like to see stronger law enforcement – both BLM and Douglas County. Past customers have become belligerent and threatening to staff, as well as disruptive to other customers. Neither BLM nor local law enforcement have been on site or within a close proximity to area which resulted in the staff feeling they had to try to control the situation. Rowdy customers realize there is no law enforcement and take advantage of staff. Law Enforcement staff stated that while on patrol, they can be up to 1 ½ hours away from site at any given time. Staff states that Douglas County law enforcement assistance has not been enough (either not adhering to hours contracted for, or not within assistance distance) Staff feels unsafe. Supervisory staff states that they recognize there was a specific individual from Douglas County that was not adhering to BLM’s needs, but that it really was a personality problem, not overall law enforcement problem. Says that this situation has been resolved and should be better this summer. The BLM Law Enforcement Ranger also states that he is one of two staff members who have divided up the entire area. He admits he is often times too far away to render assistance immediately, but says that Douglas County does that. Says that site staff wants more than he feels is necessary. Radio communication is poor outside the site which renders contact with law enforcement extremely tenuous. There is no other way to contact them other than dial 911.
11. Use Recreational Fee Demonstration Program money to hire 24-hour law enforcement. Staff members interviewed and one team member who was a customer of the site, all state there are serious alcohol-related problems at the site during the evening. Situation will be made more dangerous if a slalom course for jet skiers is built conceivably attracting more

individuals of a harmful nature. The District should take a look at developing alcohol free zones (as Roseburg is doing in Cabin Creek in day use areas) or banning alcohol altogether. In addition, take a look at instituting “panic buttons” in the booth connected directly into local law enforcement.

### **PUBLIC WELFARE, EMPLOYEE SAFETY AND LAW ENFORCEMENT**

- The site is getting 100% compliance when the fee booth is open and about 60% when closed.
- Funds Collectors get extensive training on safety and financial procedures, as well as customer service. There is a written outline of this training.
- Since the site was closed most of the signs were in storage. But, it is the site’s responsibility to make certain that the proper Recreational Fee Demonstration Program logos are visible. Further, signs need to properly reflect the need for compliance.
- In two past incidents, visitors using a popular rock for diving into the river were trapped in a crack in the rock. To eliminate the safety hazard, the rock was dynamited.
- The area is putting in a wireless alarm system on the radio base station in May 2001.

#### **Opportunity for Improvement**

12. The fee booth needs to be upgraded. The sliding glass door and lack of security endangers the safety of the employees.

### **STATE/AREA MANAGEMENT**

Other than the law enforcement issue, the staff is happy with management support to the site and the DM has given personal attention to situations at the site.





## **SHARPS CREEK RECREATION AREA EVALUATION REPORT**

### **SITE STAFF INTERVIEWED BY THE EVALUATION TEAM**

Joseph Williams, Bryant Smith, Clyde Pope

### **BACKGROUND**

The Eugene District Office has several fee sites. One of these sites, the Sharps Creek Recreation Area sites, is located within the South Valley Field Office. The Team focused on the Sharps Creek Recreation Area Recreational Fee Demonstration Program site which has 10 campsites, is clean and well maintained. The team also viewed the Row River Trail.

The area has a flyer with a paragraph about the site. This site is not a large site and not a high money maker. Visitor Recreation uses at the site include: camping, swimming, fishing, and gold panning. Most of the visitors at the site are local. The area was built in response to problems arising from homeless camping in the site. More families are now starting to use the site now, as a function of the new development. The site receives about a 98% compliance rate. The site is open from May - September. The visitation in the area was about 1,390 visitors in FY99 and 1,275 visitors in FY00. The Recreational Fee Demonstration Program improvement efforts include fire rings, paving the loop, tables, and the host site.

### **KUDOS/BEST PRACTICES**

These two sites, Row River Trail and Sharps Creek, are examples of taking a “private liability and turning it into a public asset.” The Row River rails to trails project has dramatically improved a community that was beset by drug abuse, by providing a Federal presence, lightly developing the area, and bringing recreation and law enforcement into the area. Further, a trail

head host has helped to manage use of the site. Finally, the trail has a supplemental rule to ban the use of alcohol on the site. On one end the trail runs through Cottage Grove and the partnership with the community has brought help and notoriety to the site.

At Sharps Creek Recreation Area campground, community use has reduced the environmental quality of the area and provided a place for partying that had begun to endanger visitors and shift the type of users of the area. Development of the site and the use of a camp host have dramatically improved the use of the site.

Pride in workmanship and the site is part of what makes the site relatively low cost to operate (repairs as opposed to purchases) and so clean.



The park ranger would like to have a local site-specific user survey. Best practices from other sites suggest cooperating with a not-for-profit or chamber of commerce to develop and help with the survey (e.g. Tyee Recreation Area). Such surveys have been shown to be useful in providing ready feedback to the staff from visitors.

## **WISHES**

Staff wishes include:

- Extend the trail to the possible 35 miles to Oakridge.
- Finish the last mile of trail for the railroad turnaround and the trail head at Culp Creek.
- Long term commitment to the project.

## **PLANNING: COMMUNICATING, MARKETING & BUSINESS**

- Recreation staff has made numerous presentations to a variety of local groups and organizations. Recreational Fee Demonstration Program is a major part of these presentations.

- As in other Oregon Districts where existing non-recreation fee sites were brought into the Recreation Fee Demonstration Program there is no District wide Communication or Business Plan. However, there is a draft Business Plan for Shotgun Creek.
- The site uses on-site personal communication from visitors to the site host and employees, as well as the BLM Customer Comment Cards, to solicit visitor concerns and suggestions.

**Opportunities for Improvement:**

1. While no Communication or Business Plans have been required in the past, it is recommended that such plans be developed in order to identify expected revenues, expenditures and methods for communicating the Recreation Fee Program successes to the public, internal audiences and elected representatives.
2. The District has the information necessary to produce an Annual Public Accounting of the Recreational Fee Demonstration Program project. As with other districts the opportunity to work with the Oregon State to produce a state wide “Annual Public Accounting” exists.

**PROGRAM MANAGEMENT (RMIS SITE # OR05)**

They do use a Customer Survey Card but would like to develop a site specific card because of all the positive verbal feedback the staff receives. A local citizen approached one of the team members at a local restaurant and expressed delight with this site – the cleanliness, atmosphere, swimming hole and staff. A local comment card would help to capture this kind of feedback.

Other than the Annual Program Summary, there is no other method of providing the data to the public. However, the District Recreation Specialist gives talks to many local groups and does discuss the Recreational Fee Demonstration Program site expenditures and projects.

The staff states that Recreation is not much of a priority on the district. Timber management is still the priority program. As a result timber sales are still being promoted. As a result, the staff feels there is not much emphasis on Recreation projects.

The team also viewed the Row River Trail, built in 1994. Originally an abandoned railway, it was acquired by BLM and converted to a trail for public recreation use. There are no fees charged with the exception of an occasional special recreation permit for a bicycle race or group activity. There is an onsite host at the trailhead whose presence assists with customer service and personal contact.

The staff cites that leadership at the state and national level should take more interest in the recreation program, in light of customer demands in the various districts. Customer survey results have indicated a definite interest in recreational opportunities.

Other Program Management observations include:

- Maintenance backlog is reported using FIMMS.
- MIS does not match their “cuff Records” as in other districts.
- The sites have not used the Recreation Use Survey.

**Opportunities for Improvement:**

3. Additional interpretive and environmental education needs to be done along the length of the Row River Trail. There is also an opportunity for geological interpretation and environmental education at the Sharps Creek Recreation Area day-use swimming hole.
4. The sites could benefit from the use of the Recreation Use Survey to support and market use of the Row River Trail.

**FISCAL ACCOUNTABILITY AND REPORTING**

- Fees are paid at fee tubes. Two people open fee envelopes. They are taken to the District Office and placed in a locking box, bolted to the wall. The envelopes are then taken out by the front counter employees and counted before the office opens for the day.
- The safe combination was changed today. They had a collection officer who left and the combinations were changed.
- There is a good separation of duties between receipting, receiving and depositing.

**Opportunities for Improvement:**

5. The safe used by the front counter personnel is in full view of the public. They need to cover it (with a door or poster) or move it out of view. BLM and Treasury regulations require that the safe be out of public view.

**PUBLIC WELFARE, EMPLOYEE SAFETY AND LAW ENFORCEMENT**

- There have not been any safety issues at the sites. Training and informal steps have been taken to ensure employee safety. Further, the host has radio access with the BLM office and the Sheriff's office informally monitors and patrols the area.
- Signing was hard to evaluate because the area was closed. But, it is the area manager's responsibility to make certain that the fee logos are properly displayed and that the area is properly marked as a fee site.
- The timber sale pipeline restoration fund (5830) has paid for most of the deferred maintenance projects.

**Opportunities for Improvement**

6. We encourage written instructions on procedures of collections.

## **APPENDIX**

### **RECREATION FEE DEMONSTRATION SITE EVALUATION GUIDE**

**RECREATION FEE DEMONSTRATION MANAGEMENT  
2001 Draft Evaluation Guide (2/27/01 version)**

**INSTRUCTIONS TO EVALUATION TEAM MEMBERS:** Our intent in the evaluation is for the experience to be a positive one for all. In the process of the evaluation, we hope to generate examples to help improve the BLM implementation and expansion of the Fee Demo Program. As such, this is less about audit findings and more about how to make things work more effectively, more accurately, and to reduce fiduciary risks as much as possible.

The following questions should be asked of the appropriate Recreation Fee Demonstration Program staff including: line managers, pilot fee project/site managers, finance accounts staff, and support staff. The specific person who should answer each question is indicated by section of the survey starting on the next page. It will be helpful if you can conduct a group interview of all of the appropriate people at the specific location you are visiting. All attempts should be made not to make people travel to you, as it is likely that if they travel they will not have all of the supporting documentation available.

The set of questions are divided into seven broad categories including: 1) Background, 2) Kudos and Best Practices: Appreciative Context, 3) Planning, 4) Fiscal Accountability and Reporting, 5) Program Management & Customer Service, 6) Public Welfare, Employee Safety and Law Enforcement, 7) State/Area Management. Use the attached format. Make sure to indicate the section and question number for which you are noting answers. Attach any requested documents to this interview guide. Maintain a folder for each site.

**OPENING REMARKS:** Tell the interviewee that they are part of the group of people identified by the State Recreation Lead and/or the Fee Site Manager to be interviewed for the evaluation of the implementation and management of the Fee Demo Program for this site. Describe the evaluation process to them (see description of the process in the IB 2001-044). Remind interviewees that their responses will be used to provide a closeout briefing to State and local management and that their responses will become data for the BLM evaluation report.

**SITE EVALUATION INFORMATION**

Site Name:

MIS Project No.:

Single site project / Multiple site project (circle one)

Interviewee & Type of Position of Interviewee: Proj. Mgr, Line Mgr (DO AO, FM), SO accts person, FO Accts person, Rec specialist, LE, etc. See legend below.

Office location of Interviewee:

Type of Office location of Interviewee: (SO, DO, Resource Area or FO, Site, Other \_\_\_\_\_)

Interviewer:

**DEFINITIONS**

**Project** - single or group of sites in the Fee Demonstration Program.

**Facility Requirements** - new construction, enhancements, improvements, literature, and or services provided at the site where the fees are collected.

**Abbreviations** - SM=site management group (PM, RP, RT, Admin. Officer Support Srvcs, Park Ranger, Visitor Use Assis.); Line Officer=FO/DO manager; PM= Rec Planner for Project as a whole; RP=Rec. planner working the site; RT=Rec. Tech; PR=Preliminary review; FB=Financial or budget person in FO & SO collections review staff; ME=maintenance, engineering or operations; LE=law enforcement.



<b>2001 FEE DEMONSTRATION PROGRAM EVALUATION QUESTIONS</b>	
<b>A. BACKGROUND</b>	<b>ASK</b>
1. What maps/brochures do you have that describe your site? Do you have any brochures or handouts for the public that explain the fee demonstration program? <i>[Quant.: has maps/brochure? Y / N]</i>	SM
2. Tell us about your site. Additional probes: What disability accessibility is available?	SM
3. Describe your site and its visitors and their activities. Average age of visitors?	SM
4. Describe seasonal use of the site. Do you collect fees at all possible times? What is the level of compliance with paying fees? Are there any other patterns of use? What is the origin of most visitors?	SM
5. Describe unusual conditions over the last year that may have affected collections or use or improvement projects.	SM
6. Describe visitor trends. What changes in visitation have taken place since the fee project started?	SM
7. Describe improvement efforts (e.g. roads, facilities, staffing, information/communication, education/interpretation). How were these improvements paid for? What percent with fee money?	SM
8. Are there other agencies/partners that should be closely involved in the project? How would you envision such a partnership working?	SM
<b>B. KUDOS / BEST PRACTICES: APPRECIATIVE CONTEXT</b>	<b>ASK</b>
9. What is working great at your site?	SM
10. What are the best aspects of this site and its management? (What best practices are you employing at this site that could be used elsewhere?) <i>[Quant.: List best practices]</i> What processes or best practices have you adopted/adapted from elsewhere? <i>[Quant.: List best practices adopted from elsewhere and note where]</i> What has worked well to improve compliance? What has worked well to help keep expenses down? What has worked well to generate additional revenue (e.g. donations, local agreements, passes...)?	SM
11. Describe a high-point experience in your work in/with the site in the last year.	SM
12. What positive publicity, awards or kudos has your site received?	SM
13. What issues if any would you like to see addressed in the Fee Demo Program?	SM
14. If you had 3 wishes to improve the site and/or its management, what would they be? Do you need anything from the National level to help you manage the project better? What ideas do you have for improving/expanding the fee demo program? <i>[Quant.: list the 3 wishes]</i>	SM,FO
15. Who should be recognized for major contributions to the success of the project? Have they received any types of awards recently?	SM,FO

<b>C. PLANNING: COMMUNICATING, MARKETING &amp; BUSINESS PLAN</b>	<b>ASK</b>
Based on the preliminary review of plans (communication, marketing, and business), team members should list below any exemplary practices or issues that are warranted to ask more about. Make sure that the following questions are resolved in the preliminary review or that they are asked in person.	PR
<p>16. The business plan or activity plan should be updated periodically to reflect current changes in objectives, publics, visitor needs, economic conditions, and visitor statistics. When was the business plan last updated? Has it been updated since the site was established? Is it clear why the plan was updated or not? If not, ask why. How accurate were the fee collection estimates?</p> <p><i>[Quant.: last update]</i></p> <p>If it has been updated, in what way? I.e. what do the changes mean about the site management? How accurate are the fee collection estimates in the update?</p> <p>Is the business plan thorough and does it contain information that is of value for guiding and directing implementation of the project?</p> <p><i>[Quant.: Rate effectiveness of business plan: 1=low,5=high]</i></p>	PR
<p>17. Are the communication and marketing plans of sufficient quality and sufficiently recent to be of value in implementing the project? Do you have a record of your important communication events over the last year? If so, may we have a copy?</p> <p><i>[Comm. Plan. Quant.: Rate effectiveness of plan: 1=low,5=high]</i></p> <p><i>[Mkting. Plan. Quant.: Rate effectiveness of plan: 1=low,5=high]</i></p>	PR
<p>18. Other questions of concern to the team:</p> <p>E.g. Have local office (other than DO/FO) staff been involved in communication plan events?</p>	PR,SM
<p>19. We have reviewed (or we have copies of) your business, communication and marketing plans. Is there anything in particular you want to tell us about the status and utility of the plans?</p>	SM
<p>20. How do you keep abreast of community/public concerns about your site? Demonstrate how it is tied to your communication plan (e.g. meetings with chamber of commerce, town/county commissioners, mayor, special events, PR, suggestion box, ...)?</p>	SM
<p>21. Have you accomplished the objectives established in the current business/activity plan? If not, why not?</p> <p><i>[Quant.: Y/N]</i></p> <p>To what extent is it integrated into the AWP?</p> <p><i>[Quant.: Rate extent: 1=little or none, 3=some extent, 5=very great extent]</i></p> <p>Have the actions listed in the business plan been accomplished? Are the accomplishments substantially different from what's in the plan? If so, discuss. What documentation is driving different accomplishments, if any?</p>	PM

D. FISCAL ACCOUNTABILITY & REPORTING FOR EACH PROJECT	ASK																												
<p>22. Demonstrate that all funds collected in the account are being used to pay for operation, maintenance, improvements, resource protection, law enforcement, and interpretation to enhance the recreational opportunities, and visitor experiences for sites within that project. Do you keep local records (e.g. Quick Books, cuff records)? If so, how often do you reconcile your records with the official accounts? How different are your records from the official records? Why are they different?</p> <p><i>[Quant.: % of funds being used correctly _____%]</i></p>	PR,PM, FB*																												
<p>23. What have been your appropriated dollars (1220,1230,1650,1653) for this Fee Demo project?</p> <table border="0" style="width: 100%;"> <thead> <tr> <th style="text-align: center;">1220</th> <th style="text-align: center;">1230</th> <th style="text-align: center;">1650</th> <th style="text-align: center;">1653</th> </tr> </thead> <tbody> <tr> <td><i>[Quant.: FY96 _____]</i></td> <td><i>[Quant.: FY96 _____]</i></td> <td><i>[Quant.: FY96 _____]</i></td> <td><i>[Quant.: FY96 _____]</i></td> </tr> <tr> <td><i>[Quant.: FY97 _____]</i></td> <td><i>[Quant.: FY97 _____]</i></td> <td><i>[Quant.: FY97 _____]</i></td> <td><i>[Quant.: FY97 _____]</i></td> </tr> <tr> <td><i>[Quant.: FY98 _____]</i></td> <td><i>[Quant.: FY98 _____]</i></td> <td><i>[Quant.: FY98 _____]</i></td> <td><i>[Quant.: FY98 _____]</i></td> </tr> <tr> <td><i>[Quant.: FY99 _____]</i></td> <td><i>[Quant.: FY99 _____]</i></td> <td><i>[Quant.: FY99 _____]</i></td> <td><i>[Quant.: FY99 _____]</i></td> </tr> <tr> <td><i>[Quant.: FY00 _____]</i></td> <td><i>[Quant.: FY00 _____]</i></td> <td><i>[Quant.: FY00 _____]</i></td> <td><i>[Quant.: FY00 _____]</i></td> </tr> <tr> <td><i>[Quant.: FY01 _____]</i></td> <td><i>[Quant.: FY01 _____]</i></td> <td><i>[Quant.: FY01 _____]</i></td> <td><i>[Quant.: FY01 _____]</i></td> </tr> </tbody> </table> <p>23.a. Do you have a sense that 1210, 1220, 1230, 1650-1653, 6332 appropriated dollars have been offset due to participation in the program? <b>If yes, elaborate.</b> If yes, who was involved in that decision? What are the funding trends?</p> <p><i>[Quant.: To what extent does PM think amounts have been offset? 1=little or no offset, 3=some offset, 5=major offset]</i></p>	1220	1230	1650	1653	<i>[Quant.: FY96 _____]</i>	<i>[Quant.: FY96 _____]</i>	<i>[Quant.: FY96 _____]</i>	<i>[Quant.: FY96 _____]</i>	<i>[Quant.: FY97 _____]</i>	<i>[Quant.: FY97 _____]</i>	<i>[Quant.: FY97 _____]</i>	<i>[Quant.: FY97 _____]</i>	<i>[Quant.: FY98 _____]</i>	<i>[Quant.: FY98 _____]</i>	<i>[Quant.: FY98 _____]</i>	<i>[Quant.: FY98 _____]</i>	<i>[Quant.: FY99 _____]</i>	<i>[Quant.: FY99 _____]</i>	<i>[Quant.: FY99 _____]</i>	<i>[Quant.: FY99 _____]</i>	<i>[Quant.: FY00 _____]</i>	<i>[Quant.: FY00 _____]</i>	<i>[Quant.: FY00 _____]</i>	<i>[Quant.: FY00 _____]</i>	<i>[Quant.: FY01 _____]</i>	<i>[Quant.: FY01 _____]</i>	<i>[Quant.: FY01 _____]</i>	<i>[Quant.: FY01 _____]</i>	PR,PM, FB*
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<p>24. In preliminary review, for the last completed FY determine if the deposits have been entered into RMIS and FFS. Do you have local records (i.e. cuff records)?</p> <p><i>[Quant.: FY00 or current amount in RMIS \$ _____]</i></p> <p><i>[Quant.: FY00 or current amount in MIS \$ _____]</i></p> <p><i>[Quant.: Difference: RMIS - MIS amounts = \$ _____]</i></p> <p><i>[Quant.: Difference: Cuff Records - MIS amounts = \$ _____]</i></p> <p>Can the fee demo. amounts be clearly identified from the data entries?</p> <p><i>[Quant.: Y / N]</i></p> <p><u>Ask the PM to explain the difference if any. Ask PM to indicate why amounts have not been entered, if they haven't been.</u></p>	PR,PM																												

<p>25. Describe the field controls that have been established to ensure protection of the funds collected. Describe best practices with banks, etc. What happens on a busy day during a shift change? What procedures are followed to get fees from the collection booth to the office? How do you decide when to make a deposit? Is there double accounting? Who collects fees? Who deposits fees?</p> <p>Team member note if proper field controls that are used include:</p> <p>a. 2 people together collect fees from field drop boxes [Quant.: Y/N]</p> <p>b. a replaceable locked (drop) box is used [Quant.: Y/N]</p> <p>c. other _____ (e.g. loose envelopes, need for radio contact, etc.)</p> <p>d. What ideas do you have for improving or facilitating fee collection and fee handling?</p>	PM, Off. Support Admin., Visitor Use Assis., FB*
<p>26. Financial audits are conducted by an independent auditor on an annual basis. [Quant.: Y/N]</p> <p>Get copy of latest audit.</p>	PM, FB*
<p>27. A financial audit was conducted during FY 1999 or 2000. [Quant.: Y/N]</p> <p>If yes, what were the findings? Provide copy of the latest audit. What action have you taken relative to the findings?</p>	PM, FB*
<p>28. Any other questions from team regarding audit findings?</p> <p>Are there times when the cost of collecting fees outweighs the value of the fees collected?</p>	PM, FB*
<p><b>Questions for Finance Staff for the project.</b></p> <p>29. Where is the safe located? Who has the combination? When was the combination last changed? Has any employee left since the combination was last changed?</p>	FB
30. Cash box - where is it located? Who has access to it?	FB
31. How are receipts processed?	FB
32. Check the dollars in the safe. Has it all been logged into CBS?	FB
33. Look at the deposit file. Is it current? Check deposit dates and amounts to determine if money is not being deposited timely.	FB
<p>34. Separation of duties - is there a separation between the person receipting and receiving the money and the person doing the deposit? [Quant.: Y/N]</p>	FB
<p>35. Have there been any losses? Were they reported to the National Business Center and Management? [Quant.: Y/N; &amp; Amount of losses \$_____]</p>	FB
36. Who does credit card credits? Are credit card numbers locked up? What best practices are you aware of for managing credit cards (e.g. NHOTIC)?	FB
37. Is a reconciliation being done daily?	FB

38. Is everyone responsible for collecting fees designated as a Collections Officer with their State Office?	FB
39. Is everyone responsible for a cash fund designated at the National Business Center?	FB
40. Are processes in place for when CBS is down?	FB
41. Are campground envelopes opened and counted by two people?	FB
42. How soon are collections entered into CBS?	FB
43. How often are the fee tubes emptied? Who empties them? How far does the cash have to be transported? How is it transported?	PM, FB*

<b>E. PROGRAM MANAGEMENT &amp; CUSTOMER SERVICE</b>	<b>ASK</b>
<p>44. The site/project is identified in the Recreation Mgmt Information System (RMIS) as a fee pilot site.  <i>[Quant.: Y / N]</i>            What is the name of the site in RMIS?  <i>[Quant.: Site Name _____]</i>            What is the site number in RMIS?  <i>[Quant.: Site Number _____]</i></p>	PR
<p>45. How are you monitoring and reporting your maintenance backlog? (Attach a copy) Are you using FFIMS?</p>	PM,ME
<p>46. Is the national Customer Survey Card being used to drive local action?  <i>[Quant.: Has the input been used? Y / N]</i>            How has the input been used?            Do you have a suggestion box? If so, how many suggestions do you get in a busy month? If so, have any actions been taken as a result of the suggestions?</p>	PM
<p>47. An annual public accounting of collections and expenditures of funds is required in IM97-36. Attach a copy. Have you shared the results of the accounting of the collections and expenditures with interested publics?  <i>[Quant.: Y / N; Rate effectiveness 1=low,5=high]</i>            How &amp; when? Show examples.            Which of the following methods have been used to give an accounting to the public: (check all that apply &amp; get copies)            Public Meeting ___ last meeting date: _____            Brochure ___ last update: _____            Mailings ___ last mailing date: _____            Newspaper ___ when published &amp; in what paper: _____            Other _____ date: _____</p>	PR,PM to fill in blanks for what not avail in PR.
<p>48. Customer surveys regularly suggest the need for more interpretation/environmental education. What are you doing to improve that? When did you last make an improvement in that? Do you educate volunteers who have visitor contact about the interpretive and educational aspects of the site?  <i>[Quant.: Date of last interpretive/environmental improvement _____]</i>  <i>[Quant.: How much was spent on the improvement? \$_____]</i></p>	PM
<p>49. Cleanliness of facilities is the number one factor in the satisfaction of visitors. How do you manage it? What issues/complaints have you had about it?</p>	PM,SM
<p>50. Has your site participated in the Rec. Use Survey? <i>[Quant.: Y / N]</i>            If not, why not? If so, what have the results suggested? What changes have been made as a function of the results?</p>	SM

51. Are recreation sites/areas within the project posted with the standard U.S. Fee Area sign (36 CFR, Part 71)? Is the “Recreation Fee Pilot Program” logo used on sites/areas entrance signs, project related information (i.e. brochures and maps) and project improvements (i.e. restrooms and bulletins) which have been paid for with demonstration receipts? <b>Have these pointed out on tour.</b>	SM
52. When was fee schedule last re-evaluated and assessed to ensure that the government is receiving a fair compensation for providing recreation facilities, and visitor services? [Quant.: Date of last reevaluation_____] [Quant.: Date of last adjustment to fee_____] What is the current public sentiment about your fee schedule? Get copy of latest assessment report. Get copy of current fee schedule (and prior one if fee has been adjusted recently).	PM
<b>F. PUBLIC WELFARE, EMPLOYEE SAFETY AND LAW ENFORCEMENT</b>	<b>ASK</b>
Background: Where are the fees physically collected (e.g. where are the posts) relative to the FO? How remote are the fee collection sites? How long does it take to collect the fees? What route is used to collect the fees? Who collects the fees? What procedure is used to collect the fees? (Also see the answer to Q43)	SM,LE
53. Describe the safety procedures that are in place to ensure the safety of employees when collecting fees and the security of the fees collected. Are the standards in a written form? [Quant.: Y / N] Are relevant employees familiar with the standards?	SM,LE
54. What degree of compliance in paying the fees are you getting? [Quant.: What % of visitors are paying fees? _____%] How are compliance issues addressed? Have any warnings, tickets or letters been sent out? Is law enforcement of fee payment adequate? Is it an issue? Who has authority for issuing a ticket?	SM,LE
55. Are appropriate warning signs in place, inspected and maintained? [Quant.: Y / N] <b>Ask to see them on the site tour.</b>	SM,LE
56. What priority in backlog/deferred maintenance is given to public health and safety? (See the preliminary review notes to get a sense of what was accomplished last year).	SM,LE, ME,FO
57. Describe recent safety issues from the last year? What steps have been taken relative to these issues?	SM,LE, ME,FO
58. What steps are being taken to prevent crime or robbery?	SM,LE

<b>G. STATE/AREA MANAGEMENT (SEE FS VERSION)</b>	
59. How adequate is management support for the pilot fee demonstration program? <i>[Quant.: Rate adequacy of support: 1=barely adequate, 3=it's okay, 5=it's great]</i> Provide examples that demonstrate the level of support (e.g. management has attended public meetings, provides additional resources in peak periods).	PM
60. How adequate is management guidance to initiate planning and implementation requirements? <i>[Quant.: Rate adequacy of guidance: 1=barely adequate, 3=it's okay, 5=it's great]</i> Why or why not?	PM
61. Please describe the nature of the relationship between the NLCS program/staff and recreation program/staff for sites within this project that are within NLCS boundaries?	SM,PM
<b>H. CLOSEOUT</b>	
1. What do you value most about yourself as a site manager?	SM
2. What do you value most about the staff that manages your site?	SM

\* Same question asked of different project people by different evaluation team people; e.g. funds collection question asked of PM by general team members and asked of FB by NBC team member.



## List of Documents Requested

- ✓ Communication plan
- ✓ Marketing plan.
- ✓ Business plan.
- ✓ Annual public accounting of the collections and expenditures of funds as required in IM97-36.
- ✓ Used the following methods to give an accounting to the public: (Q49) (check all that apply & get copies)
  - Public Meeting ☐ last meeting date: \_\_\_\_\_
  - Brochure ☐ last update: \_\_\_\_\_
  - Mailings ☐ last mailing date: \_\_\_\_\_
  - Newspaper ☐ when published and in what paper: \_\_\_\_\_
  - Other \_\_\_\_\_ date: \_\_\_\_\_
- ✓ Annual financial audit conducted internally (Q42)
- ✓ Annual financial audit conducted by independent auditor (Q43). Audit findings, if any.
- ✓ Current fee schedule (and prior one if fees have been recently adjusted)
- ✓ Assessment of fee report
- ✓ What brochures do you have that describe your site?
- ✓ Copy of standards to ensure safety of employees when collecting fees and/or drop boxes.
- ✓ What brochures do you have that describe your site?
- ✓ To facilitate the development of a graphically attractive report, do you have any photographs that are available electronically?
- ✓ Any GAO/IG reports on site within the last 5 years
- ✓ Policy Manuals

## List of Reports to be Collected or Run by Evaluation Team Prior to Going on Site (& Question for which the Report is Used)

- ✓ MIS reports supporting questions 21-23.
- ✓ RMIS report: The site/project is identified in the Recreation Mgmt Information System (RMIS) as a fee pilot site. YES / NO (circle one) (Q25 (from hand report) & Q45)
- ✓ Recreation Use Survey Statistics for the site
- ✓ Customer Comment Card Report for the site
- ✓ Site submission for Annual Report to Congress
- ✓ Review of PE charges for 1232, 1220, 1230, 1650-1653 regarding possible offsets
- ✓ Review the website
- ✓ Copy of deferred/backlog maintenance schedule for prior and current year. List of what projects were accomplished in the prior FY.
- ✓ Any GAO/IG reports on site within the last 5 years